DCFS
Department of Children & Family Services

IDCFS | FACILITY REPORTING

Provider Facility
User Training

Presented by

Allen Yang
Allen.Yang@illinois.gov

OBJECTIVE ARTS
TECHNOLOGY CONSULTING

October 13/14, 2009

Agenda

- Webinar Control Panel

- About Facility Reporting
  - Access

- Getting Started

- Facility Contact Homepage

- CSR Form and Usage

- Monitor Initiated Forms
  - Staffing Evaluation
  - Meeting/Other Staffing
  - Milieu Observation
  - File Review
  - UIR/906 Fidelity Report

- Residential Discharge Tracking Report

Webinar Control Panel
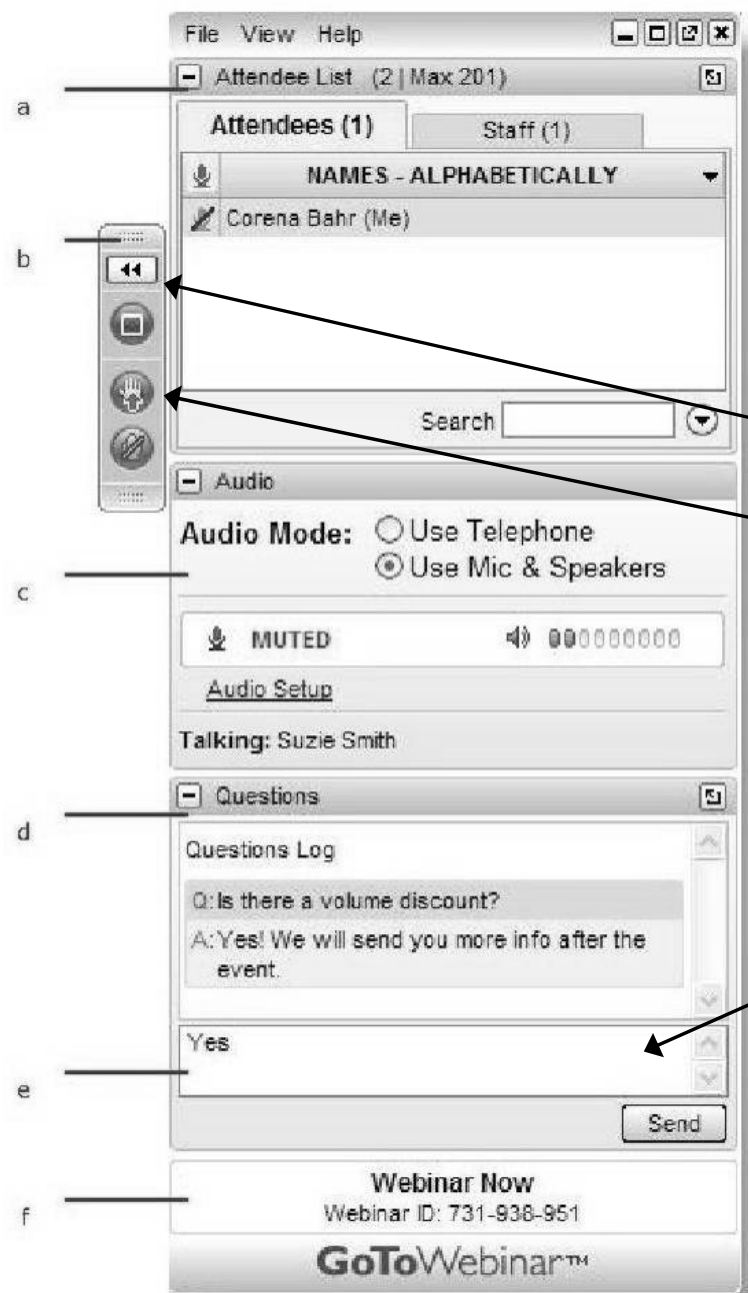
Grab Tab (b)

- Minimize Panel control
- Hand icon – click to let us know you have a question

Question pane (d)

- Type questions or requests. We will try to answer them as time permits. We will publish all questions and answers

About Facility Reporting

IDCFS | FACILITY REPORTING

The Facility Reporting application allows for **Residential Performance Monitors** and **Residential Facility Contacts** to communicate regarding individual clients or other issues identified.

- Facility Contacts record and submit Clinical Staffing Reports (**CSRs**) and Monitors review and comment on your **CSRs** when necessary.

- Monitors record and submit Clinical Staffing Report-Staffing Evaluations (**CSR-SEs**) and for your review and comment.
- Monitors will also send you additional reports for review and comment
    - Meeting/Other Staffing Review
    - Milieu Observation
    - UIR/906 Fidelity Review
    - File Review

How do I get access to the Facility Reporting application?

1. Complete the online training for RTOS/UIR and Facility Reporting applications and submit the training evaluation form found at https://illinoisoutcomes.dcfs.illinois.gov/training.html

2. Have your supervisor fill out a "Request for Access to RTOS/UIR and Facility Reporting Applications" form and send to the DCFS Helpdesk

Each Facility Contact user must submit both forms:
- RTOS/UIR Online Evaluation form
- Request for Access to the RTOS/UIR & Facility Reporting form

- DCFS OITS Helpdesk Telephone Number - (800) 610-2089
- Email Address - Helpdesk.OITS@illinois.gov
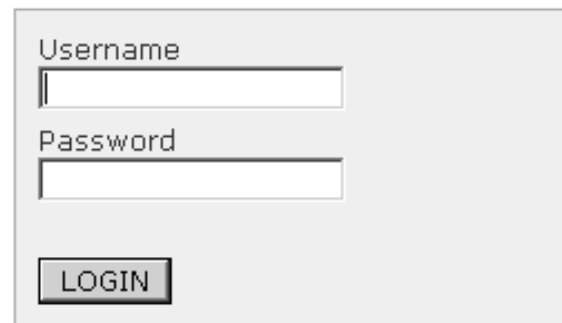
Getting Started

Illinois Outcomes Homepage - https://illinoisoutcomes.dcfs.illinois.gov

IDCFS

HOME | RTOS | UIR | IA-CANS | CAYIT-CANS | CWS-CANS | FACILITY REPORTING | REPORTS | PROVIDER DATABASE | ONLINE TRAINING | MESSAGE BOARD | CONTACT

Click on the Facility Reporting link.

Login with the Username and Password provided by the OITS Helpdesk.

Please Login:

Username

Password

LOGIN

Note: Password is case sensitive.

If you have questions please call the DCFS Help Desk 800-610-2089.

Facility Contact Homepage

The Facility Contact Homepage is divided into 5 work areas:

1. New CSR Forms
2. Reports Search and Results
3. Incomplete Clinical Staffing Reviews
4. Reports Currently Pending Your Response
5. Reports Sent to Monitor for Comment

IDCFS | FACILITY REPORTING

Logged on : Allen Yang Change Password | Logout

Save as PDF

Facility Contact Homepage

New CSR Forms

Create New Clinical Staffing Report

- Create New **Clinical Staffing Report** hyperlink

Reports Completed

Start Date:
07/07/2009
mm/dd/yyyy

End Date:
10/07/2009
mm/dd/yyyy

Form Type:
All

Search

- Reports Search Area

Review Date ⇕	Form ⇕	Unit ⇕	Client Name ⇕	CYCIS ⇕	Monitor ⇕
09/20/2009	MO	Benet Lake Boys	(none)	(none)	Monitor2, FOR
09/20/2009	CSR	Doors	Houston, Shaundell	u1830404	Monitor2, FOR
09/10/2009	CSR-SE	Doors	Houston, Shaundell	u1830404	Monitor2, FOR
08/26/2009	FR	Doors	Houston, Shaundell	U1830404	House, Debra
07/29/2009	CSR-SE	Doors	Houston, Shaundell	u1830404	Monitor2, FOR
07/28/2009	CSR-SE	Doors	Houston, Shaundell	u1830404	Monitor2, FOR
07/27/2009	CSR	Doors	Houston, Shaundell	u1830404	Monitor2, FOR

- Reports Search Results List

Incomplete Clinical Staffing Reviews

Review Date ⇕	Form ⇕	Unit ⇕	Client Name ⇕	CYCIS ⇕
10/05/2009	CSR	Doors	Houston, Shaundell	u1830404

8

Incomplete Clinical Staffing Reviews

Review Date	Form	Unit	Client Name	CYCIS
09/16/2009	CSR	Doors	Houston, Shaundell	u1830404
09/15/2009	CSR	Doors	Houston, Shaundell	u1830404

Reports Currently Pending Your Response

Review Date	Form	Unit	Client Name	CYCIS	Monitor
07/27/2009	PMOSR	(none)	(none)	(none)	Monitor2, FOR

Reports Sent to Monitor for Comment

Review Date	Form	Unit	Client Name	CYCIS	Monitor
08/19/2009	CSR	Doors	Houston, Shaundell	U1830404	Monitor2,FOR
07/29/2009	CSR	Doors	Houston, Shaundell	u1830404	Monitor2,FOR
07/28/2009	CSR	Doors	Houston, Shaundell	u1830404	Monitor2,FOR
07/27/2009	PMOSR	Walter Cherry	(none)	(none)	Monitor2, FOR

- Incomplete CSRs list

- Reports Currently Pending Your Response list

- Reports Sent to Monitor for Comment list

New CSR Forms

Click on "Create New **Clinical Staffing Report**" to create a new CSR

Only Facility Contacts staff can create Clinical Staffing Reports

Reports Search and Results

You can use Start Date, End Date and Form Type to reduce the number of reports returned when you click on Search
Note: You can only see reports created by you or sent to you by a RPMU Monitor.

You can also SORT the results of your search by clicking on the column headings.

Incomplete Reports

Incomplete Clinical Staffing Reviews

Review Date ⬍	Form ⬍	Unit	⬍	Client Name ⬍	CYCIS ⬍
09/16/2009	CSR	Doors		Houston, Shaundell	u1830404
09/15/2009	CSR	Doors		Houston, Shaundell	u1830404

This section will list CSRs that have not been sent to the RPMU Monitor and require further work from you.

Incomplete CSRs can be deleted.

Reports Currently Pending Your Response

Reports Currently Pending Your Response

Review Date ⬍	Form ⬍	Unit ⬍		Client Name ⬍	CYCIS ⬍	Monitor ⬍
10/04/2009	FR	Doors		Houston, Shaundell	u1830404	Monitor2, FOR
10/04/2009	CSR-SE	Doors		Houston, Shaundell	u1830404	Monitor2, FOR
08/19/2009	CSR	Doors		Houston, Shaundell	U1830404	Monitor2, FOR
07/27/2009	PMOSR	(none)		(none)	(none)	Monitor2, FOR

This Section will list:
• CSRs initiated by you and returned by the Monitor
• CSR-SEs or other reports (such as Milieu Observation, File Review, etc.)
a Monitor has sent to you for review/comment

Click on the Form name to open it.
Click EDIT and make any requested responses.
Click SEND to send it back to the monitor.

13

Reports Sent to Monitor for Comment

Reports Sent to Monitor for Comment

Review Date ⬍	Form ⬍	Unit ⬍	⬍	Client Name ⬍	CYCIS ⬍	Monitor ⬍
08/19/2009	CSR	Doors		Houston, Shaundell	U1830404	Monitor2,FOR
07/29/2009	CSR	Doors		Houston, Shaundell	u1830404	Monitor2,FOR
07/28/2009	CSR	Doors		Houston, Shaundell	u1830404	Monitor2,FOR
07/27/2009	PMOSR	Walter Cherry		(none)	(none)	Monitor2, FOR

This section lists CSR's and other reports that you have sent a Monitor.

You can re-assign a CSR to another Monitor by clicking on the Monitor's name.

Click on the Form name to view it. These reports are read-only for you until the Monitor responds.

14

Work and Watch Sections

Your Homepage has two sections containing forms that require work from you:

- **Incomplete Reports**
- **Reports Currently Pending Your Response**

Your Homepage also has one section that displays read-only forms that you are watching:

- **Reports Sent to Monitor for Comment**

CSR – Workflow & Data Entry

Facility Contact Homepage

New CSR Forms

Create New **Clinical Staffing Report**

The CSR workflow begins when you click "Create a New Clinical Staffing Report" from the New CSR Forms section on your Homepage.

Clinical Staffing Report - Sections

- Cover Sheet
  - Client information
  - Staffing Information
  - Staffing Type Selection (Phase I, Phase II, Action Plan only)
  - Treatment Team
  - Medicaid
- Phase I – Page 1, 2, 3
- Phase II – Page 1, 2, 3
- Action Plan

- Monitor Response Notes

Client information

Residential Agency - Clinical Staffing Report

Client Information

(RRE.1a) **CYCIS ID:**	(RRE.1b) **Client Name:**	(RRE.1c) **Client DOB:**	(RRE.1d) **Client Admission Date:**
u1830404 [Search]	Houston, Shaundell	02/20/1995	01/13/2009

Enter the CYCIS ID of the client who was the subject of a clinical staffing.

You can now enter Clients who have been discharged. If a discharged client has been placed at another facility, the Admission Date may be incorrect.

Enhancement: Allow user to select from a list of spells after searching for a CYCIS ID.

Staffing Information

Staffing Information

(RCS.2a)
Agency Name:
Uhlich ▾

(RCS.2b)
Unit Name:
Doors ▾

(RCS.3a)
Staffing Date:
10/03/2009 🗓
mm/dd/yyyy

(RCS.3b)
Staffing Start Time:
12 ▾ 00 ▾ PM ▾

(RCS.3d)
Next Clinical Staffing Date:
10/30/2009 🗓
mm/dd/yyyy

Confirm:
☐ staffing over 30 days ago
☐ staffing over midnight
☐ staffing over 8 hours

(RCS.3c)
Staffing End Time:
05 ▾ 00 ▾ PM ▾

Verify Agency Name and Unit Name, change if necessary for discharged clients

Enter Staffing Date, and Start & End Time
If the Staffing occurred over 30 days ago, click on the "Staffing over 30 days ago" checkbox
If the Staffing occurred over midnight, click on the "Staffing over midnight checkbox
If the Staffing took over 8 hours, check the "Staffing over 8 hours" checkbox

Bug fix: Next Clinical Staffing Date after Staffing Date, not current date

Staffing Location & Type

Enter Staffing Location & Staffing Type.

Staffing Types
1. Phase 1 (Initial, Ongoing, Supplemental)
2. Phase 2 (Combined, Transition Only, Supplemental)
3. Action Plan only

Treatment Team Members

(RCS.9)
Treatment Team Members:

Name:	Role:	Attendance:
safasdf	DCFS or POS Caseworker	Present - In Person
sadfsadf	DCFS or POS Caseworker Supervisor	Present - Conference Call
sadfasdf	Youth	Present - In Person

Add Team Member

- Click "Add Team Member" if you need to add additional team members

Medicaid Section

(RCS.6)
ITP Goal (#) Addressed:
sadfasdf

(RCS.7.1)
Medicaid Service Type:

○ Case Management - Client Centered Consultation

○ Case Management - Mental Health

◉ Case Management - Transition Linkage

○ Community Support - Residential

○ Community Support - Individual

○ Treatment Plan Development, Review and Modification

○ Other

(RCS.8.2)
Name of person providing Medicaid Service:
asdfsadf

(RCS.8.1)   (RCS.8.5)
Medicaid   Credentials of person providing Medicaid
Qualifications: Service:
MHP ▾   sadfasdf

(RCS.8.3)   (RCS.8.4)
☐ This service was performed On: [   ] 🖩
                              mm/dd/yyyy

(RCS.8.6)
Description of Medicaid Service delivered:
8 of 1000 characters
asdfasdf

[Next]

- For facilities with alternate means of tracking Medicaid information, just enter "N/A"
- Enhancement: Make this an optional section

Monitor Response Notes

Monitor Response Notes 87 of 1000 characters

RP2.5b - please explain the XYZ of the ABC
RP2.10a - need more information about item e

Contacts	Name	Timestamps	Datetime
Monitor Contact	Monitor2, FOR	Created	2009-08-19 10:27:47.0
Facility Contact	Yang, Allen P.	Submitted	2009-08-19 10:28:13.0
		Returned	2009-10-04 17:50:42.0
		Submitted	2009-10-13 10:23:39.0
		Returned	2009-10-13 10:25:38.0

Edit   **Save as PDF**   **Exit**

Monitor Response Notes are located near the bottom of the report and will show any comments that the Monitor added after you have sent it to him/her for comment.

Providers should view the response notes to determine if further explanation or changes are requested.

Make any appropriate changes by clicking on EDIT

23

Residential Evaluation/ Questions

Phase II - Residential Quarterly/Transitional

- All "No" responses require a narrative explanation.

Page 1   **Page 2**   **Page 3**

#	Question	Answer
RP2.2	Were the tasks in the action plan for the previous staffing completed? (If No, elaborate in Notes)	○ Yes ○ No, incomplete ○ No, no action plan from previous staffing ○ N/A, no previous staffing
	Notes: Add 0 of 500 characters	
RP2.3a	Does the youth have an active relationship with adult family members or other significant adults?	○ Yes, calls/visits ○ No
	Notes: Add 0 of 500 characters	
RP2.3b	Indicate the following information for adult family members or other significant adult with whom the youth has an active relationship. Name: ____ Relationship: ____ Role: Placement Resource ▼ Add another familiy member/significant adult	

A response is required for each question.
Certain responses will trigger the Notes section for additional explanation.

24

Action Plan

Bug fix: Due Date after staffing date, instead of current date

CSR data capture workflow

(1) Facility Contact Creates New CSR

(2) Facility Contact fill outs CSR

(3) Facility Contact Sends CSR

(4) Facility Contact Saves CSR as PDF for internal distribution

(5) Monitor receives CSR

(6) Monitor reviews CSR enters Response Notes

(7) Monitor Returns CSR

(8) Facility Contact receives CSR

(9) Facility Contact views comments and makes edits to CSR

(10) Facility Contact Sends CSR

(11) Monitor receives CSR

(12) Monitor reviews modified CSR

(13) CSR is completed

1. Facility Contact initiates a CSR
2. Facility Contact fills out the CSR
   - Cover Sheet
   - Phase I or Phase II or Action Plan only
   - Action Plan
3. Facility Contact selects and sends the CSR to Monitor
4. Facility Contact saves CSR as PDF for print or email distribution to all other treatment team members
5. Monitor receives a submitted CSR to review
6. Monitor reviews CSR and adds responses (or skip to 12)
7. Monitor sends CSR back to Facility Contact for Facility Response
8. Facility Contact selects a returned CSR for response
9. Facility Contact reviews Monitor's comments & responds accordingly
10. Facility Contact sends revised CSR to Monitor
11. Monitor selects returned CSR
12. Monitor reviews and closes CSR (or sends back to step 6)
13. CSR is completed and can now be found in archived search

26

After Entering Responses to a CSR

Once you have finished entering responses on a CSR,
you have the choice of performing several actions:

Save — Clicking the Save button will store all your entered responses and allow you to return to the report at a later time.

After saving your responses and clicking EXIT, the report is listed under "**Incomplete Reports**" on your homepage.

Edit — When you return to a saved report you will need to click the Edit button to continue.

Exit — Clicking the Exit button will return you to your homepage. Make sure to click Save before exiting!

Delete — Clicking the Delete button will remove an incomplete CSR from the Facility Reporting database. Only Incomplete CSRs can be deleted

Save as PDF — The Save as PDF button will allow you to create a file on your computer that you can use to print or email the report. Please remember that all reports are confidential for use by your facility team and the RPMU Monitor only.

27

Sending a CSR

Send After you have entered all your desired responses, click the Send button

Select your RPMU Monitor Contact from the dropdown list

Click on Send to Monitor

Application will save your responses, check for completeness and

1. Redisplay the report with error messages, or

2. Send the report to the monitor

close or Esc Key

Submit for Review

Monitor Contact: Barrett, Billie ▼

Send to Monitor

Forms sent to a Monitor will display on your home page under "Reports Sent to Monitor for Comment"

Once a CSR has been sent to a Monitor, it can no longer be deleted.

28

Working with Monitor initiated forms

In addition to the CSRs you will be creating and sending to your Monitor for comment, the Monitor will be creating and sending several forms for your review and comment, including:

- Staffing Evaluation (CSR-SE)
- Milieu Observation (MO)
- Meeting/Other Staffing (PMOSR)
- File Review (FR)
- UIR/906 Fidelity (UIR-FR)

Monitor Initiated Forms on your homepage

In addition to CSRs that have been returned with Monitor responses, Monitor initiated reports will be shown on your homepage under "Reports Currently Pending Your Response."

Click on the form to view it.

Reports Currently Pending Your Response

Review Date	Form	Unit	Client Name	CYCIS	Monitor
10/12/2009	PMOSR	(none)	(none)	(none)	Monitor2, FOR
10/07/2009	CSR-SE	Doors	Albright, Onwar	S0129904	Monitor2, FOR
10/04/2009	FR	Doors	Houston, Shaundell	u1830404	Monitor2, FOR
10/04/2009	CSR-SE	Doors	Houston, Shaundell	u1830404	Monitor2, FOR
09/22/2009	MO	(none)	(none)	(none)	Monitor2, FOR
08/19/2009	CSR	Doors	Houston, Shaundell	U1830404	Monitor2, FOR
07/15/2009	UIR-FR	Doors	Houston, Shaundell	u1830404	Monitor2, FOR

Staffing Evaluation (CSR-SE)

- Client information

- Staffing Information

- Staffing Type Selection (Phase I, Phase II)

- Residential Evaluation

  - Page 1

  - Page 2

- Monitor Observation Summary

Meeting/Other Staffing (PMOSR)

- Staffing Information

- Meeting/Other Staffing Notes

- Areas for Review/Improvement

- Facility Response Area

Milieu Observation (MO)

- Staffing Information

- Milieu Review Questions

- Monitor Observation Summary

- Facility Response Areas

File Review (FR)

- Client Information
- Staffing Information
- File Review Questions
- Monitor Observation Summary
- Facility Response Areas

UIR/906 Fidelity Review (UIR-FR)

- **Client Information**

- **Staffing Information**

- **UIR Fidelity Review Item**

    - Agency Documentation Data

    - UIR Website Report Verification Data

    - 906 Fidelity Review Data

- **UIR Fidelity Review Summary**

- **Facility Response Area**

Facility Response Required

- Some questions will have a "Facility Response Required" selected by the Monitor.

- You must enter a response to these items to complete the form

#	Question	Answer	Facility Response Required	Facility Response Due Date
FIL.5	Is there a comprehensive and ongoing assessment that drives the Individual Treatment Plan(ITP)?	○ Yes ◉ No	☑	10/30/2009 🗒 mm/dd/yyyy
	Facility Response: 42 of 500 characters Click on EDIT and enter your response here			
FIL.6	Do ITP and services address behaviors that	◉ Yes	☐	🗒

Report Options

Edit   Click the Edit button to add responses where requested.

Save   Click the Save button at any time to store all your entered responses.

Save as PDF   Click the Save as PDF button to create a file on your computer that you can print or email to other team members. Please remember that all forms are confidential for use by your facility team and the RPMU Monitor only.

Exit   Click the Exit button to return you to your homepage. Make sure to click Save before exiting!

Send   OR, if you are DONE with entering all responses, click on SEND. This will Save your work, Send the report to the Monitor, and Exit to back to your homepage.

How do I clean up my homepage?

1. Log in to the Facility Reporting application

2. Select an item in your Incomplete Clinical Staffing Reviews area

3. Click EDIT, then make the necessary edits for this CSR

4. Click SEND when finished, select your Monitor, then click Send to Monitor

5. Repeat 2-4 until no more Incomplete CSRs

6. Select an item from your "Reports Currently Pending Your Response"

7. Click on EDIT

   1. For CSRs, respond as needed per the Monitor Response Notes

   2. For CSR-SE's and other Monitor initiated reports, respond to the items marked with "Facility Response Required"

8. Click on SEND when finished

9. Repeat 6-8 until no more Reports Pending Your Response

Residential Discharge Tracking Report

39

Residential Discharge Tracking Report Selection Options

Residential Discharge Tracking Report Contract Aggregates

Residential Discharge Tracking — Contract Aggregates

Fiscal Year:	2010									
Agency:	AGENCY NAME									

Phase I

Contract	CRD Past Due	< 3 months	3 - 6 months	6 - 12 months	12 - 18 months	18 - 24 months	24+ months	Total Spells with Phase I CSR	No CSR (Not Due)	No CSR (Overdue)	Total Spells
004259242	1	0	0	2	0	2	1	6	1	2	9
020343206	2	5	0	1	0	0	0	8	0	7	15
191684205	0	0	1	0	4	0	0	5	0	3	8
191684206	0	0	1	2	1	1	0	5	0	2	7
Total	3	5	2	5	5	3	1	24	1	14	39

Residential Discharge Tracking Report
Resident Detail Report

Discharge Tracking – Contract Resident Detail Report

Fiscal Year:	2010
Agency:	AGENCY NAME
Contract:	020343206

Not Discharged Spells

Youth Name	CYCIS ID	RSF Code	Admission Date	Transition Status	Most Recent CSR	CRD*	Months Until CRD*	PDD*	Days Until PDD*	# CSRs	LOC 1	LOC 2
		6D0183	10/22/2008	Phase I -- CSR Overdue						0		
		6D0183	08/28/2008	Phase I	06/16/2009	12/31/2009	3			1	TLP	
		1B 03	06/05/2008	Phase I	04/30/2009	08/01/2009	2 late			1	TLP	
		2A 03	08/24/2009	Phase I -- CSR Overdue						0		
		3B 15	11/19/2008	Phase I	06/16/2009	12/15/2009	2			1		
		3B 19	01/16/2008	Phase I -- CSR Overdue						0		
		2A 20	09/03/2009	Phase I -- CSR Overdue						0		
		1B 03	02/22/2007	Phase I	04/07/2009	12/01/2009	2			1		
		3B 31	07/30/2008	Phase I	06/02/2009	12/31/2009	3			1		
		3A 05	05/15/2007	Phase I -- CSR Overdue						0		
		1B 03	02/26/2009	Phase I	06/23/2009	05/31/2010	8			2		
		3B 15	03/26/2009	Phase I -- CSR Overdue						0		

Questions? Need Help?

DCFS/OITS Help Desk

1.800.610.2089

HelpDesk.OITS@illinois.gov